**Toy Sales**

**Lecture 7: Writing our DAX Sales Performance Measures**

**Measures\_01:**

Cost = SUM(Sales[Total Cost])

Profit = SUM(Sales[Total Profit])

Revenue = SUM(Sales[Total Revenue])

Units = SUM(Sales[Units])

**Measures\_02:**

YTD Revenue = TOTALYTD([Revenue], Dates[Date])

Previous YTD Revenue = CALCULATE([YTD Revenue], SAMEPERIODLASTYEAR(Dates[Date]))

**New\_Column:**

Limit date table to just the date that are in our sales data

Sales Data Cap = IF(Dates[Date]<=MAX(Sales[Date]),1,0)

**Add Filter:**

Apply filter across all pages by dragging (Sales Data Cap) to filter on all pages

“Sales Data Cap is 1”

**Measures\_02:**

YOY Difference = DIVIDE([YTD Revenue],[Previous YTD Revenue])-1

Convert it to %

**Add Line Chart1:**

Add Line Chart: [X-Month\_Short], [Y-Revenue], [Legend-Year]

**Measures\_02:**

Running Total Revenue = CALCULATE([Revenue],DATESBETWEEN(Dates[Date],STARTOFYEAR(Dates[Date]),MAX(Dates[Date])))

**Add Line Chart2:**

Add Line Chart: [X-Month\_Short], [Y- Running Total Revenue], [Legend-Year]

Add constant line of goal in line chart

**Measures\_02:**

Goal = 8500000

Progress Towards Goal = DIVIDE([YTD Revenue],[Goal])

**Add Bar Chart123:**

Bar Chart 1: [X-YTD Revenue], [Y- Product Category]

Bar Chart 2: [X-YOY Difference], [Y- Product Category]

Bar Chart 3: [X- YOY Difference], [Y- Store Location]

**Lecture 9: Building a Product Performance Page**

**Add Bar Chart123:**

Bar Chart 1: [X-YTD Revenue], [Y- Product Name]

Bar Chart 2: [X- YTD Profit], [Y- Product Name]

Bar Chart 3: [X- YTD Units Sold], [Y- Product Name]

**Measures\_02:**

YTD Profit = TOTALYTD([Profit],Dates[Date])

YTD Units Sold = TOTALYTD([Units],Dates[Date])

**Format Bar Chart123:**

Rename Title: {[ YTD Revenue by Product], [YTD Profit by Product], [YTD Unit Sold by Product]}

Conditional Formating Bar:

**YOY Performance of Product:**

**Create Table**

Add: Product\_Name, YTD Revenue, Previous YTD Revenue, YOY Difference, YOY Difference 2

Rename Column: Product\_Name, YTD Revenue, LY YTD Revenue, % Difference

Format Table Background and Values Colour

Some Products are introduced this year, there is no previous year data for them so,

**Create new Measures­\_02**

YOY Difference 2 = IF([Previous YTD Revenue]=0, BLANK(),[YOY Difference])

**Add Cluster Column Chart:**

Column Chart : [X- Product Name], [Y- YOY Difference 2]

Format Chart

Add Zoom Slider

**Lecture 10: Building a Store Performance and Store Tooltip Page**

**Add Bar Chart123:**

Bar Chart 1: [X-YTD Revenue], [Y- Store Name]

Bar Chart 2: [X- YOY Difference 2], [Y- Store Name]

**Add Map:**

[Location: Store City], [BubbleSize: YTD Revenue]

Format Accordingly

**Add New Worksheet Store Tooltip (Hide it)**

Visualization -- Format Page -- Page Information -- Allow use as ToolTip

Add cards: -- Store Name, Store Location, YOY Difference, Previous YTD Revenue, YTD Revenue

Add Bar Chart: -- Top 10 Products by YTD Revenue, Bottom 5 Products by YOY Revenue Growth

**Now more complex DAX for Store Page:**

* **To Know how much Inventory is left**

**Measures\_03:**

Inventory in Hand = SUM(Inventory[Stock\_On\_Hand])

**Add Matrix:**

[Rows:Store Name, Product Name], [Value: Inventory in Hand]

* **To Know how many days of Inventory is left**

**Measures\_03:**

**To calculate max date (i.e. 30 Sept 2023)**

Max Sales Date = CALCULATE(MAX(Sales[Date]),ALLSELECTED(Sales))

**To calculate avg daily units sold in last 30 days**

Avg Daiy Units Sold = CALCULATE(AVERAGEX(ALLSELECTED(Dates[Date]),[Units]),DATESBETWEEN(Dates[Date],[Max Sales Date]-30, [Max Sales Date]))

**To calculate days of inventory left**

Days of Inventory Left =

~~IF([Avg Daiy Units Sold]=0,BLANK()), (added Later 26:10)~~

DIVIDE([Inventory in Hand],[Avg Daiy Units Sold])

* **To find Inventory left for top 5 product ranked on Revenue**

**Measures\_03:**

**To rank product based on revenue.**

Rank YTD Revenue = RANKX(ALLSELECTED(Products[Product\_Name]),[YTD Revenue])

**To Filter Rank Matrix**

Filter Rank Matrix = IF([Rank YTD Revenue]<=5,1,0)

Add this measure to filter tab of table and select “is 1”

**To Filter inventory days :** Filter Days of Inventory Left is less than 1 and is not Blank

**Lecture 11: Projecting Sales Performance vs Annual Target**

**Add Filter:**

Apply filter in this pages by dragging (Year) to filter on this pages

“Year is 2023”

**Add Table so that we can create Forecast Chart based on New Table Values:**

Drag Date Uncheck Date Hierarchy, YTD Day Count, Remaining Days, Revenue, Running Total Revenue,

**Measures\_04:**

**Distinct Date in (Sales[Date]) is 273 after that 273 persist because we count date from (Dates[Date]).**

**It is necessary for next step (Days Remaining):**

YTD Day Count = TOTALYTD(DISTINCTCOUNT(Sales[Date]),Dates[Date])

**Calculate Remaining Days**

Remaining Days = TOTALYTD(DISTINCTCOUNT(Dates[Date]),Dates[Date])-[YTD Day Count]

**Calculate Average Daily Revenue**

Avg Daily Revenue = DIVIDE([Running Total Revenue],[YTD Day Count])

**Now we require last average revenue (i.e. 25,502 @ 30/09/2023)**

Avg Daily Revenue (Today) = CALCULATE([Avg Daily Revenue],ALLSELECTED(Dates[Date]))

**Remaining Year Forecast:**

Remaining Days Forecast = [Remaining Days]\*[Avg Daily Revenue (Today)]

**Total Running Total + Forecast (****i.e. From 30 sept onwards what should be projected revenue)**

Running Total + Forecast = [Running Total Revenue]+[Remaining Days Forecast]

**FORECAST CHART**

**Add Line Chart2:**

Add Line Chart: [X- Date], [Y- Running Total + Forecast]

Add constant line of goal in line chart

Or just copy paste from product performance sheet and edit it.

**Create new measures to edit Forecast Line Chart**

**Measures\_05:**

**To add [Actual Revenue] + [Forecasted Revenue] (i.e. Running Total + Forecast) Y axis in Line Chart**

Projection - YTD Revenue = IF([Revenue]<>BLANK(),BLANK(),[Running Total + Forecast])

**Now add [Running Total Revenue](Measure\_02) and [Projection - YTD Revenue](Measure\_05) in Y axis of Line Chart.**

**To remove extra line of [Running Total Revenue](Measure\_02) from chart (20:21)**

Running Total Revenue Stop = IF([Revenue]=BLANK(),BLANK(),[Running Total Revenue])

**Now interchange [Running Total Revenue Stop] with [Running Total Revenue] in Y axis**

**To add marker(dot) at Today and Max Forecast Date**

**For Today**

Current YTD Revenue = IF(SELECTEDVALUE(Dates[Date])=CALCULATE(MAX(Sales[Date]),ALLSELECTED(Dates[Date])),[Running Total Revenue],BLANK())

**Now add [**Current YTD Revenue**](Measure\_05) in Y axis of Line Chart.**

**For Max Forecast Date there are two measures**

**1st to calculate max date (31/12/2023)**

Max Forecast Date = MAXX(ALLSELECTED(Dates[Date]),CALCULATE(MAX(Dates[Date])))

**2nd for Forecasted Amount**

End of Year Projection = IF(SELECTEDVALUE(Dates[Date])=[Max Forecast Date],[Running Total + Forecast],BLANK())

**Now add [**End of Year Projection**](Measure\_05) in Y axis of Line Chart.**

**Format Forecast Chart**

Rename Legends in Y axis (25:23)

**Adding Other Items on Dashboard**

Add New Parameter (Slider)

Modelling -- min(6000000) -- max(12000000) – ok

Move Parameter value (Interactive Goal) to Measure\_05

Select Chart – add further analysis to visual – constant line -- fx – Interactive Goal

Add New Parameter2 (Slider)

Modelling -- min(6000000) -- max(12000000) – ok

Move Parameter value (Interactive Goal) to Measure\_05

Edit Avg Daily Revenue (Today)[Measure\_04] to

Avg Daily Revenue (Interacted) = --CALCULATE([Avg Daily Revenue],ALLSELECTED(Dates[Date]))

'Parameter 2'[Parameter Value]

**Format Both Slider Sets**

**Add 3 Card Charts: Progress Towards Goal, Interactive Goal, Running Total + Forecast**

**Measures\_05:**

**To add to Progress Towards Goal Card**

Progress Towards Projected Goal = DIVIDE([Running Total + Forecast],[Interactive Goal])

**To add conditional colour to card**

Card Color Progress = IF([Progress Towards Projected Goal]>=1, "#14967C", "#F6AB09")

Change effect background fx – field value – Card Color Progress